

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2016-2017

Quarter: 4

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 2

Provider: Legal Services of Northern California

Counties: Lassen, Modoc, Shasta, Siskiyou, Trinity

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 3

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte Counties

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Yuba Sutter Legal center

Counties: Sutter and Yuba Counties

Optional Success
Story(ies)/Case Summary(ies)

Legal assistance hours for the quarter include 279.75 for Sutter County and 194.25 for Yuba County (474.00). Legal representation hours include 12.25 for Sutter County and 24.00 for Yuba County Yuba Count (36.21 total). Grand total of services units for the 4th quarter FY 16/17 total 510.25 hours. The community education activities were found for sutter County with 8.50 hours and three for Yuba County with 8.50 hours (17.00 total).

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 4

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success
Story(ies)/Case Summary(ies)

A woman in her late sixties received a notice of termination of tenancy from her property manager, alleging the woman had misrepresented her income on her initial application for tenancy. The client identifies as limited- English proficient ("LEP"), and did not understand income reporting requirements to remain eligible for her affordable housing unit. The owner of the property subsequently filed an unlawful detainer action in superior court to evict her. A staff attorney agreed to represent the client in the unlawful detainer action. Working under the staff attorney's supervision, a law student contacted the property owner's attorney and successfully negotiated a settlement that allowed the client to remain in her apartment. The staff attorney appeared in court on behalf of the client and entered the settlement agreement into the record, which allowed the woman to stay in her apartment and avoid a judgment against her.

A woman in her sixties received two notices of rent increases from her property manager within a six-month span. Together, the notices purported to increase her rent by 50 percent. A volunteer attorney informed the client that management's first notice properly allowed her more than 60 days' notice before increasing her rent. However, the volunteer attorney also advised the client that management's second notice was impermissible under California law, because it gave her fewer than 60 days' notice for a rent increase of over 10 percent. The client the contacted her property management company to dispute the second notice of rent increase. The management company rescinded the second notice, and later served the woman with a letter that gave her the proper 60 days' notice before increasing her rent again. Given this additional time, the woman was able to move into a new, more affordable apartment before the second rent increase was to take effect.

A woman in her sixties received a number of notices from the Social Security Administration (SSA) one of which informed her that she was entitled to Social Security Survivors Benefits dating back to 2006. A separate notice then awarded the client a \$2,400.00 lump sum of retroactive Survivors Benefits. A staff attorney reviewed the notices, and after researching various federal statutes and regulations governing SSA Survivors Benefits, advised the client that SSA correctly calculated the retroactive lump sum amount to which she was entitled. Because the woman also receives supplemental Security Income (SSI), the staff attorney advised the woman about properly spending down the lump sum so that it would not adversely impact her eligibility for SSI.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Legal Services of Northern California

Counties: Yolo

Optional Success
Story(ies)/Case Summary(ies)

Mr. Z and his wife, who are both 75+ years old, were assaulted by their neighbor when they were out for a walk in their neighborhood. The neighbor yelled racial slurs at the couple and physically knocked down Mrs. Z, causing her to fracture her wrist and sustain other injuries. This was not the first assault by the neighbor. They were granted an emergency protective order for a week which was set to expire when they contacted LSNC for assistance with a permanent restraining order. LSNC staff assisted with an elder abuse restraining order and represented the couple at the hearing. The restraining order was granted for a period of three years and protects MR. and Mrs. Z and their relatives who visit them at their home.

Mr. Z is an older adult who was homeless for nearly seven years. He recently moved into housing but he was struggling to afford food. He applied for CalFresh and was denied benefits. He provided the County with his legal status documentation but the County mistakenly asked USCIS to verify that he had a green card when he has another legal status. The County issued a notice of action denying him benefits when the County could not confirm his status with USCIS due to their mistake. Mr. Z sought assistance at LSNC during outreach hours. LSNC assisted the client with appealing and provided the County hearing representative with the legal authority granted benefits pending verification from USCIS using the correct documentation of his legal presence.

Ms. R is a 68 year-old single woman who lives in HUD subsidized housing. The management sent her a notice of termination of tenancy for failing to recertify. Ms. R was unable to provide the requested documents in a timely manner because she is disabled and required help to obtain the documents. She attempted to negotiate with her landlord for more time but the landlord refused to consider her request. She ultimately contacted LSNC for assistance. LSNC submitted a formal written request to the management's attorney that they consider her request for additional time as a reasonable accommodation based on her disability and engage in the interactive process required under fair housing laws. After months of negotiating with the attorney, the management agreed to provide her with additional time, enabling her to remain housed in an apartment she can afford.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff holds office hours at the following locations: Esparto: 1st Thursday of the month, every other month at RISE; West Sacramento: 4th Thursday of the month at the Senior Center; Knights Landing: As needed, 1st Monday of the month at the Center for Families; Winters: date to be determined. The RISE seniors group no longer meets so we are searching for alternative outreach opportunities in Winters. Clarksburg: As needed 4th Thursday of the month at library. Davis: 1st Monday of the month at Grace in Action (housed at the United Methodist Church). In addition, LSNC attends monthly meetings of the Multi-Disciplinary team with APS, HHSA, and other advocated for older adults. LSNC also participates in regular meetings of the Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Health and Human Services, Veteran's Services, and representatives from the three Senior Centers. LSNC is also participating in planning meetings for the Yolo County ADRC.

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Provider: Legal Services of Northern California

Counties: Nevada, Placer

Optional Success
Story(ies)/Case Summary(ies)

April 2017 - 1. Assisted several older adults with completing responses to wage garnishment and to bank levies and preventing further garnishment and levies. 2. Mr. R was a Nevada County senior who had been working as a live-in caregiver for another Nevada County senior. The elderly man passed away and the home went into foreclosure. Mr. R received a 90-day notice to vacate the property, but was unable to locate another suitable housing situation. He contacted us in early February because he received notice that an eviction case had been filed against him. We explained the eviction process to Mr. R and the consequences of having an eviction judgment against him. We assisted him with an answer to the case to prevent a default judgment. We also advise him that because he had no real defenses to the case, his best strategy was to negotiate a settlement. He understood the need to move as soon as possible, and in mid-April was able to locate another place to move. After advising the opposing side that Mr. R was no longer in possession of the home and negotiated a dismissal of the eviction case. We assisted Mr. R. in successfully navigating the eviction process so as to avoid a money judgment or eviction on his record, affecting his credit, and produced a win-win resolution to the benefit of all of the parties involved.

May 2017 - LSNC negotiated a housing agreement between two high-risk elders resulting in the stabilization of their housing and continued access to necessary health services and support.

June 2017 - LSNC advocates assisted several older veterans with keeping their housing until they could find alternative housing better suited to their needs. LSNC assisted several mentally and behaviorally challenged older persons with stabilizing their housing until they could find housing better suited to their health care needs. LSNC assisted many older persons with dealing with debts and debt collectors.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC advocates continue to collaborate with a wide variety of elder and disability rights groups locally, statewide and nationally. Due to the confidential nature of the legal services we provide we are not always able to report with whom we are collaborating at the time we are doing so. For example, this office has collaborated in the past with the California Department of Justice, various district attorneys' office, law enforcement and medical/social service providers on cases for our older clients.

April 2017 - LSNC advocates provided information to Placer County victim Services in support of a case involving a victim of criminal elder financial abuse. LSNC advocates provided information to Adult Protective Services regarding assessing the validity of powers of attorney.

May 2017 - LSNC advocates continue to collaborate with a wide variety of elder and disability rights groups locally, statewide and nationally. Due to the confidential nature of the legal services we provide we are not always able to report with whom we are collaborating at the time we are doing so. For example, this office has collaborated in the past with the California Department of Justice, various district attorneys' office, law enforcement and medical/social service providers on cases for our older clients.

June 2017 - LSNC advocates continue to collaborate with a wide variety of elder and disability rights groups locally, statewide and nationally. Due to the confidential nature of the legal services we provide we are not always able to report with whom we are collaborating at the time we are doing so. For example, this office has collaborated in the past with the California Department of Justice, various

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district attorneys" offices, law enforcement and medical/social service providers on cases for our older clients. In June, Mother Lode Regional Advocates and volunteer LSNC Elder Law attorney Richard McGinnis participated in the Aging Safely event coordinated by the Placer County PROJECT team. LSNC/MLRO is a member of the PROTECT team formerly known as the Community / Agency Multidisciplinary elder Team. This event drew 250 seniors and their families to the Roseville Galleria to listen to speakers and gather information about how to age safely.

PSA: 5

Provider: Legal Aid of the North Bary

Counties: Marin County

Optional Success
Story(ies)/Case Summary(ies)

New Attorney started at MVCC every 1st Thursday for Senior Advice Appts. At our 2nd session on Advanced Healthcare Directives at Rotary Manor, at least 5 residents completed the documents and they were witnessed.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 6

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Provider: Nihonmachi Legal Outreach dba API Legal O **Counties: San Francisco**
Outreach

Optional Success
Story(ies)/Case Summary(ies)

Client, an elderly person living in San Francisco, has very limited income, and is on General Assistance (GA). He also has advanced cancer. Because he is getting chemotherapy and other treatments, client was sometimes too exhausted to meet and work on his naturalization application. Our attorney patiently worked with him, and completed the application at a pace that worked for the client. APILO finished helping him apply for citizenship, and he became a U.S. Citizen. Sometimes the legal work is simple, but the benefits to the client are long-lasting. In this case, Client now has access to additional resources because our office helped him become a U.S. Citizen. He is now getting additional financial support through SSI.

Optional Information on
Collaboration with Other
Advocacy Groups

APILO hosts an API Elder Abuse Task Force for our community-based partners to address issues of safe and secure living for elders and adults with disabilities. Every year, we plan a brown bag series covering topics such as scams targeting seniors or immigration relief for both the general public and CBO's. APILO is also an active member on the San Francisco Long Term Care Coordinating Council (LTCCC) that advises the Mayor on issues surrounding services for elders and adults with disabilities in the city. Specifically, we work in the subcommittee on housing crisis. In addition, we work with the Family Violence Council and department on Status of Women around issues of Elder Abuse. As a founding and active member, we meet with other community based agencies, the DA's office, Victim Witness services, and Adult Protective Services, sharing best practices and ways to better serve limited English-speaking elders and people with disabilities. Two of our attorneys are also on the Aids Legal Referral Panel, where along with other requirements: clients are entitled to an initial hour of consultation free of charge; simple wills, DPAs, and declarations to physicians are provided at no charge; and each attorney takes at least two cases per year from the panel. API Legal Outreach remains a legal and technical resource for every partner organization and collaborative in the areas of elder law and abuse.

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Provider: Asian Americans Advancing Justice - Asian Law Center **Counties: San Francisco**

Optional Success
Story(ies)/Case Summary(ies)

Client L is a disabled mother whose only source of income is Social Security benefits. She became disabled in 2009 when she suffered a stroke that paralyzed one side of her body. Over time, Client L has regained some range of movement, but she continues to require mobility assistance. Although, her minor son was into a top magnet public school, he chose to go to a less prestigious school closer to their home so that he could continue to support his disabled mother. Client L's son has thrived at this closer high school and has truly made the best of a difficult situation. Client L and her family came to our clinic when they received an owner move in notice, threatening the family with eviction if they do not vacate by mid-August, right before Client L's son starts a new school year. Although, client L and her family are relative new clients, we have already developed legal defenses to their pending eviction and are hopeful that we can defeat this owner move in notice. If we are successful, under San Francisco law protecting students from eviction during the school year, the landlord would be forced to start the process all over again after the school year finishes. This would mean that Client L's son could remain at this school for another year. Although the owner move in case is still pending, we have already been able to assert Client L's tenancy rights. In our correspondence with the landlord's attorney, we've been able to get repairs done for Client L and to also assert Client L's right to lawful utilities payments. Client L was so surprised that the landlord sent repairman to the unit that she called us to double-check that she did not have to pay for these basic repairs herself. We assured her that it was the landlord's obligation to keep her home habitable. We have empowered Client L and her family to stand up for their tenancy rights.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success
Story(ies)/Case Summary(ies)

In the month of April, I took an estate planning case to draft a will/trust combination for an elder. I worked with them and their family to determine the needs of the client, the client's interests, and the best plan to ensure personal, family, and economic harmony. I helped the elder through our estate planning process to ensure they provided complete and truthful information to our office as to their needs and desires for their property upon incapacity or death and drafted the will and trust combination for the elder. In drafting this will and trust, I protected nearly 1.8 million dollars in real and personal property from probate proceedings, undue attorney's fees, potential attack by hostile third parties, and excess taxes and fees / expenses. I was able to protect the client's financial future and personal and financial situation from all substantial negative risk.

Optional Information on
Collaboration with Other
Advocacy Groups

Monthly Legal Clinic with Curry Senior Center 1st Thursday of the Month. Monthly Latino Partnership for services Provider Meetings and presentations to groups of service providers including caregiver alliance. Monthly outreach presentations on Legal topics to local SRO Tenants. Collaboration with EDC Attorney in Eviction Case for elder. Presentation and organizing for SRO Tenants in order to build group awareness, capacity, will, and strategy to organize to counter landlord abuse.

Provider: Legal Assistance to the Elderly

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

We have had many successful cases this quarter including the following: One success involved a 70 year old senior whose daughter suffers from a mental health disability and had begun to harass him. This harassment included threatening to kill him, following on the sidewalk, spitting on him and appearing at his home at all hours of the day and night ringing the bells for all the apartments in his building. We were able to get a permanent restraining order against the daughter and she has already been stopped from harassing him further and was hospitalized. Our housing Defense team we had a very complicated case involving a section 8 unit and a non-profit housing provider. The SFHA had stopped paying the rent due to habitability defects it alleged that the landlord was responsible for. However, the client also had a very cluttered apartment and needed APS' assistance in cleaning up the unit. We were able to work with APS and clean up the unit, and after a lot of advocacy and litigation we were able to get the SFHA to pay the rent it owed and our client and her family were allowed to remain in their housing.

Optional Information on
Collaboration with Other
Advocacy Groups

LAE continues to collaborate with community groups. In particular, we continued to work closely with APS on our Elder Abuse Prevention and Eviction Defense cases. The overwhelming majority of our Elder Abuse cases are referral from APS. This partnership continues from the referral through to the Court appearance and decision. APS's work is also invaluable in our eviction defense cases, including cases with isolated seniors and those who need assistance cleaning their apartments.

PSA: 7

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Quarter: 4

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 8

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success
Story(ies)/Case Summary(ies)

"Abigail" is 86 ears old, and lives alone in her home in a small peninsula town. In 2014 she was assaulted by her daughter Wendy in her home. Wendy is six feet tall. She punched Abigail and Abigail was trapped and held down, screaming for help but no one was around. Eventually she let up and Abigail fled in her car. She didn't know where to go, but saw a friend's car at a coffee shop and stopped. He called the police, who helped Abigail get in touch with Legal Aid. Legal Aid Senior Advocate Claire Ramsey helped her obtain a permanent elder abuse restraining order with a move out order to remove Wendy from the home. Three years have passed and she has only seen her daughter once, but Abigail still lives in rear to this day. They both live in the same small town, so there is a high likelihood of crossing paths. Wendy is an alcoholic and Abigail is scared that fi she allows the restraining order to expire, her daughter will come back in her life and hurt her. The Senior Advocates attorney met with Abigail at the Magnolia Senior Center in South San Francisco. He talked with Abigail about the option of renewing the order, even though there had been no abuse since the incidents in 2014. He worked quickly, and obtained a TRO the day prior to the expiration of the three ear restraining order. Weeks later, the attorney represented Abigail at the hearing, and obtained another three year restraining order. Abigail now feels safer doing her errands around town, and driving to the shop she owns on the coast.

Optional Information on
Collaboration with Other
Advocacy Groups

No new collaborative activity this quarter.

PSA: 9

California Legal Services (Title III B)

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Provider: Legal Assistance for Seniors

Counties: Alameda County

Optional Success
Story(ies)/Case Summary(ies)

Emma is 75 years old and is the sole owner of her home in East Oakland. Her 28 year old grandson was living with her when he threatened her with a knife. She was referred to us from the DA Victim Witness Advocate for a restraining order with residence exclusion. Abuser was in jail on other DV charges filed by his partner. He also has a long criminal history and drug abuse issues, along with severe mental illness. He also threatened to beat the client up and destroyed her cell phone so she could not call the police. LAS met with the client and represented her in filing the restraining order and move out request. The TRO was granted and abuser violated. He was served by police and arrested for violation. We appeared with Ms. Brooks several times in court in Hayward. Client was also granted a 3 year CPO from the DA's office. Final hearing, abuser was present from Santa Rita and did not dispute the restraining order. The court then granted the RO and move out for 5 years, full protections. She was so pleased to have the protections and happy we assisted he through the process.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as education presentations and referrals to other community resources.

PSA: 10

Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services For the 4th quarter of 2016-17, SALA provided on-site legal service intake appointments at 24 senior centers or sites in Santa Clara County. These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXXIII Senior Center temporarily located at Gardner Community Center during Alma's renovation (San Jose), Seven Trees Camden Community Center (San Jose), Almaden Senior Center (San Jose), Los Gatos Recreation Center, Saratoga Senior Center, Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

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PSA: 11

Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 12

Provider: Area 12 Agency on Aging

Counties:

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 14

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Provider: Central California Legal Services

Counties: Fresno, Madera

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 15

Provider: Central California Legal Services, Inc.

Counties: Tulare County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Central California Legal Services Inc.

Counties: Kings County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 16

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Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success
Story(ies)/Case Summary(ies)

As we now have an emphasis to focus of our services towards more legal and community education including referrals, we are currently planning to host 1-2 community education presentations at separate senior centers in the community for the upcoming quarter and provide continued distribution of recently updated referrals and self-help packets. During this quarter the following materials were distributed to seniors:
Self-Help Packet 14 - Power of Attorney (POA) -
16 - Advance Health Care Directive - Self-Help Packet

Optional Information on
Collaboration with Other
Advocacy Groups

In June our staff distributed legal materials to the senior community by attending and participating in the Inyo County Health & Human Services Long-Term Care Ombudsman Program & Adult Protective Services Elder Abuse Awareness event and Senior Resource Fair.

PSA: 17

Provider: Senior Legal Services Project

Counties: San Luis Obispo

Optional Success
Story(ies)/Case Summary(ies)

The Project successfully helped a client avoid eviction from her mobile home. The project helped the client negotiate and mediate the situation with the landlord which resulted in allowing the client to stay in her mobile home and an improved relationship between the parties. ## A 90 year old client's son-in-law was threatening the client and demanding that she give him some of her personal items, bringing her into small claims court after his own home burned down. She wanted a restraining order for elder abuse. We were unable to resolve all claims and he agreed to the terms of a restraining order, which the judge ordered without the need of a trial. ## Low-income senior needed to be placed in assisted living but could not afford it without selling his house. He couldn't sell his house because his abusive alcoholic daughter was living there, bothering the neighbors, not paying rent, and wouldn't move out. We filed eviction papers on his behalf and had his daughter served while she was in jail. She defaulted and judgment was entered in favor of our client.

Optional Information on
Collaboration with Other
Advocacy Groups

We attended the Adult Abuse Prevention Council meeting and annual Elder Abuse Seminar.

PSA: 18

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Provider: Grey Law of Ventura County

Counties: Ventura

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 19

Provider: Bet Tzedek

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 20

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Provider: Inland Counties Legal Services, Inc.

Counties: San Bernadino

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 17E7002356 The client is a disabled senior who wants an Advance Healthcare directive (AHCD) and a Financial Durable Power of Attorney (POA-Financial). Though she is in seemingly good health for her age, she wants to be prepared for the future in case anything was to happen to her. The advocate prepared both an AHCD and POA-Financial for the client's signature and provided her with the original documents. The client was advised that if she wanted to revoke either document, this could be done by physically destroying the document or by executing a new AHCD or POA-Financial which would specifically revoke the prior document(s). The advocate further advised the client that the originals be kept in a safe place such as a safe deposit box. The client now has peace of mind knowing that her wishes are legally documented.

Case #2: 15E-6007745 A married senior couple filed for Chapter 7 Bankruptcy. They had liens from collection judgments and were facing a sheriff's sale on July 5, 2017. With the help of ICLA advocates the clients filed their motion to avoid the liens. Two of the liens were able to be removed that totaled over \$7,000.00. The third lien was originally a little over \$4,000.00. Due to the amount of the current mortgage, the judge was hesitant to remove the third lien and told the clients to try to settle the case. The clients were able to negotiate a settlement of \$8,000.00 paid over a period of 60 months. Judgment Creditors added their attorney fees and court costs. The clients were comfortable with the terms and entered into the agreement. The Judgment Creditor stopped the sheriff's sale upon the filing for the dismissal of the motion in Bankruptcy Court. Now the clients are in a better position to sell their property and not lose their equity income that would have been lost had the sheriff's sale proceeded.

Case #3: 17E7002960 the client is a 76-year old divorced senior who is requesting assistance regarding protecting her son's interest in her home after she passes away. Title is held b the client and her son as joint tenants, they are aware that the home cannot be sold or refinanced unless they both agree and that her interest in the home will automatically pass to her son when she passes away. The client's son-in-law told her that after she passed away her son was planning on selling the home and moving to Oregon to live with them. Her son told her that he had no intention of selling the home or moving to Oregon. The client's concern is that her son-in-law will be able to talk her son into doing what he wants because according to the client, her son is too nice and does not know how to say no. The client decided that she wants to add 4 of her granddaughters to the title because they would respect her wishes. The advocate advised the client that she should only add her granddaughters to the title with a Life Estate for the client and her son. A Life Estate would allow the client and her son to maintain their ownership and occupancy rights for the rest of their lives and the home would not be able to be sold or refinanced. The advocate told the client that she would need to consult with her managing attorney to see if there might be any other options available. After that consultation, the advocate advised the client that adding the granddaughters to the title with a Life Estate would not be in the best interest of the client or her son, instead the client should consult with a private attorney who specializes in Estate Planning who would be able to advise the client properly as to the best way to protect her home and her son at the same time. The client advised the advocate that she did not have the funds to pay a private attorney and preferred to proceed with a Life Estate. Because these were the client's wishes, the advocate prepared a new Grant Deed with Life Estate documents for the client. The client was very pleased that her wishes had been honored.

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Optional Information on
Collaboration with Other
Advocacy Groups

In-Kind Support to Title III-B Legal Services for Seniors Department on Aging & Adult Services (Hours not reported elsewhere in Quarterly Report)	431 In-Kind Case
Hours related)	0 In-Kind Supervision Hours (case
Hours	0 In-Kind Outreach
	3 In-Kind community Education Hours

PSA: 21

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Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 17E-2002636

ICLS's client, a senior who was receiving Food Stamps, moved from San Bernardino County to Riverside County. This results in an Inter County Transfer, or ITC. Both counties issued Food Stamps. She received a termination letter from the Department of Social Services (DPSS) notice of an overpayment. The letter accused her of receiving double food stamp benefits, assessed her with an overpayment and implied that she had committed fraud. She tried to tell them that she did not receive double benefits, the county did not listen. At this point she came to ICLS and met with an advocate who agreed to represent her.

The advocate requested a hearing and met with the county and was able to determine that the food stamps the client had been accused of using were still sitting on her EBT card. The client had no idea that the benefits were on her card. She knows that she is allotted \$124.00 per month and that is what she spends. The client signed an authorization for DPSS to withdraw the \$124.00 from her card to resolve the overpayment, her benefits will not be reduced and her eligibility will continue uninterrupted.

Furthermore, the advocate explained to the client about Section 8 Housing as well as about Subsidized Housing (where your rent is 30% to 40% of "earnings") and the client is now familiar with the two different programs.

The advocate helped the client (who does not use the internet and has difficulty getting around) by signing her up (via the internet) for the Section 8 Housing Voucher Wait List and provided her with the receipt. Additionally, the advocate went to "Go Section 8" and helped the client obtain a subsidized listing of housing that available and contacted two apartment complexes that added the client to their short wait list. The client currently lives with her daughter and grandchildren and wants to move to less crowded housing. She is unable to afford an apartment on her own.

Case #2: 16E-4009839

The client is a 97 year old who sought help from ICLS regarding a Medicare premium issue. She had a high Medicare premium of \$485.00. She had penalties assessed on her premiums due to Social Security stating that she could not show that she had health insurance, which caused the client not to apply for Medicare when she turned 65 years old. The client did, in fact, have health insurance coverage (and still does) through her deceased husbands retirement – The Getty Retiree Medical Plan from 1989-present.

The client worked with the ICLS advocate to obtain proof of her health insurance coverage for Social Security. She received notice from Social Security in April 2017 stating that her monthly Social Security benefits were going to be increased from \$1,364.00 to \$1,517.00. She also received notice from Social Security stating that she would be receiving back payment of \$3,677.00.

Case #3: 17E-2002989

The client, an 88-year old senior, contacted ICLS initially because she had been denied MediCal. The

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reason given was because she had property outside of the country. In the course of the interview, the advocate identified multiple issues as enumerated below.

The advocate explained eligibility criteria for SSI as far as assets, income, etc.; explained the affect of a "reverse mortgage" to the client and her daughter; and provided documents and materials that explained how the client could apply and that SSI could be applied for over the phone.

MediCal and IHSS Services were explained. The client's daughter was taken aback by the fact that her mother had qualified for the SSI program for 23 years and not a single social agency, including Social Security, had told her about the SSI program that could have supplemented the mother's income and greatly impacted the quality of her life. Instead she had suffered financially often going without.

The client's daughter was quite stunned and very much appreciated the advice regarding SSI and will help her mother apply for it. She will also apply, on behalf of her mother, for MediCal and IHSS services utilizing her sister as the mother's caregiver.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 22

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Provider: Legal Aid Society of Orange County

Counties: Orange

Optional Success
Story(ies)/Case Summary(ies)

We recently represented an elderly couple with obtaining an elder abuse restraining order and a kick out order against their tenants who were renting a room from the elderly couple's home. They rented a room to a lady and then 2 months later the tenant's husband came to live in the home after getting out of prison. Both tenants were drug addicts and had bouts of violence towards each other and towards the clients. The police were called on several incidences. The tenants also threatened the clients that they were going to poison their food and make them lose their home. Before contacting the Seniors Legal Advocacy Program, the clients had already filed for a temporary elder abuse restraining order. The Court had denied the temporary restraining order because the client was not age 65 at the time of the abuse. The client was a veteran who suffered from problems with his spinal cord, herniated disks and lost the function of his left arm. The tenants were represented by their mother who was an attorney. The client contacted us 3 day before the trial. At the trial, we were able to prove that the client was dependent disabled adult under the probate code and the client was granted a 5 year restraining order and also a kick out order against the tenants.

Optional Information on
Collaboration with Other
Advocacy Groups

During the quarter we continued our involvement with a number of organizations such as the Elder Abuse Forensic Center and the UC-Irvine law School to collaborate with our SSI clinic. We also collaborated with City Net, a non profit organization aimed to end street level homeless. Through this collaboration we are able to go out weekly to the Santa Ana Court Yard Shelter to provide direct legal services to the homeless (a percentage of the homeless being seniors) who would otherwise not be able to obtain those services because of either lack of transportation or lack of telephone.

PSA: 23

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Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success
Story(ies)/Case Summary(ies)

#1 Our client is on project-based Section 8, meaning that the subsidy is managed by the landlord and not by the San Diego Housing Commission. The client reported that in previous years, she had been doing some part-time caregiving work, but had stopped doing so in the fall. This meant that her income had fallen significantly. As soon as she stopped working, she informed her landlord. The landlord, however, failed to reduce the client's portion of rent. The client repeatedly contacted the landlord and implored them to make the necessary adjustment to reflect her then-current income. The landlord kept putting the tenant off - for months. This created a serious financial hardship for her. The client approached us with the situation. We researched the situation extensively and drafted a demand letter to the landlord, citing multiple HUD policy references. Six weeks later, the client called to let us know that a retroactive calculation of rent had been done and that she was not going to have to pay anything to the landlord for six months. This client was very pleased that our intervention had been so successful.

#2: Our client, an 85-year-old, low-income woman, had gone to an optometrist for a new prescription. She ordered new glasses and sunglasses based upon the prescription. Upon receiving her glasses and sunglasses, she noticed that she was unable to see out of them. She complained to the doctor that the prescription was not correct. She returned for another eye exam. The optometrist verbally acknowledged that he had given her the wrong prescription previously. He refused to provide a refund. We researched the issue and drafted a demand letter to the optometrist. The optometrist agreed to send a refund and mailed a check to our office. The client was very pleased to receive the refund.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 24

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Provider: Elder Law & Advocacy

Counties: Imperial

Optional Success
Story(ies)/Case Summary(ies)

#1: Our client who has a disability, is low-income, and lives alone in a very rural area of the county, was referred to us after a concerned neighbor witnessed Client being exploited by several people. When client came to our office he had recently been released from jail. The incident causing him to be jailed occurred when Client confronted his former friend/caregiver about transferring vehicles into his own name. While Client was in jail, he agreed a couple could stay in his home to safeguard it. Upon his release, however, the couple refused to allow Client back into his home. The man who had been staying in his home attacked Client with a glass item, causing a deep cut on Client's face. The couple also reportedly vandalized his property and created a nuisance throughout their stay in client's home. Due to their refusal to allow Client in his own home, Client was homeless and living in a nearby shed when he first met with ELA. The ELA attorney assisted Client with drafting a strongly worded notice demanding the couple occupying his property vacate Client's property within three days due to the fact that man had attacked Client and the couple had damaged the home. Within one week of Client contacting our office, the couple moved out of Client's home, an APS social worker was working to locate resources for Client, and the sheriff's department began an investigation into the prior abuse Client had suffered. Client was further instructed to return for assistance with a restraining order if necessary.

#2: Client's spouse passed away last year after a long battle with cancer. He later received a bill from his insurance company demanding over \$43,000 be repaid for medication his wife utilized prior to her death. After ELA contacted the Client's employer, it was discovered the employer input the incorrect date of death, causing the insurance company to believe coverage was not available. The employer stated they would contact the insurance company to resolve this issue, however, Client continued to receive billing notices several months later. Thus, the ELA attorney contacted the insurance company and explained the issue, sent proof of the employer's mistake, and requested the insurance company confirm the medications were covered and Client did not owe anything. The insurance company provided confirmation of the correction and Client has not received any further bills. Client was grateful for the intervention ELA offered to assist him during the difficult period following his spouse's passing.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 25

California Legal Services (Title III B)
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Provider: Bet Tzedek

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 26

Provider: Legal Services of Northern California

Counties: Mendocino and Lake

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 27

Provider: Legal Aid of Sonoma County

Counties: Sonoma

Optional Success
Story(ies)/Case Summary(ies)

Here is a story which once again demonstrates the connection between housing stability and elder abuse. Mabel is 85 years old. She owns her home, but nearly lost it due to her mentally ill son. Mabel's son had lived with her for 10 years; he began hoarding in the home soon after he moved in. By the time she came to Legal Aid's Elder Law Program for assistance, her bathroom had been dismantled, her kitchen was dysfunctional, and she was relegated to preparing her meals in a make shift kitchen inside a closet using disposable plates and forks. Legal Aid's Elder Law Program filed for an elder abuse move-out petition, which removed the son. The elder court facilitated an extensive move-out, allowing for the removal of the hoarded materials from the elder client's home. (Note the number of cases opened is higher than the unduplicated client count, because one client had more than one case opened during the quarter.)

Optional Information on
Collaboration with Other
Advocacy Groups

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PSA: 28

Provider: Bay Area Legal Aid

Counties: Napa

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 29

Provider: Senior Legal Services

Counties: El Dorado County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 30

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Provider: Dor v' Dor Senior Advocacy Network

Counties: Stanislaus

Optional Success
Story(ies)/Case Summary(ies)

Had several elder financial abuse cases where vulnerable seniors with dementia being financially abused by Friends/caregivers who are longtime friends. Neither case is related but in both cases the live in 'caregiver' took advantage of the senior using undue influence to try to gain access to the senior's estate. In on case, the ex-girlfriend took the senior out of county and had a civil marriage ceremony while the abused spouse was heavily medicated after just being released from rehab after braking his back in an auto accident. She then took him way out of county to an attorney who drew up a trust and Will and prepared a deed transferring the home out of the senior's name into a joint tenancy with the new bride. With the help of the daughter, we filed an emergency conservatorship, restraining order and annulment and are after marriage in annulled will void the trust. In the other case, the 90 year old woman was abused by her 59 year old long time "care giver" who sometimes set himself out as her "boyfriend", "friend" and even "son". He took her to the bank and her withdraw \$11,000, closing the account, reopening at another bank with about \$5,000. He had her sign a revocation of POA, revoking her two daughters' ability to help in her finances; changed her doctor, fired her old attorney and hired a new one, remove her from her home at midnight so he could take her to the new attorney to try to change her Trust, leaving it up to her to do as she please with her nearly half a million dollars. Before she could change her trust, we were able to get 2 doctors to state she had dementia and then filed an affidavit to change trustees, thus causing the trust to become irrevocable. We filed an emergency conservatorship and restraining order, both which were granted, and had this guy kicked out of her house. In the 6 years since he moved in to her house, he alienated her from her friends, did not work, and accumulated 2 Porsches, 2 Ford trucks and a Mercedes Benz. He also had access to her finances and spent thousands of dollars buying things on Amazon and using linking her credit card to PayPal for purchases. The case is on-going with the next hearing in August. The senior has been suffering from chronic UTI's and is extremely confused, angry, belligerent to her tow daughters who have moved in with her to take care of her and her health needs. One lives out of state and the other lives 5 hours away.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work closely with the DA, Ombudsman office and APS on elder abuse cases occurring in assisted and skilled nursing facilities. One of our clients was living in the memory care unit of an assisted living facility. One day he walked out of the locked gate when it did not close behind on of the facility's vendors. He was gone over an hour and the facility did not know he was gone until a Veterinarian's office found him in the street after he had fallen down and called the facility. The family of the senior asked us to make a report to the Ombudsman office a week after the event. The Ombudsman office knew nothing about the incident.

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Provider: Central California Legal Services

Counties: Merced

Optional Success
Story(ies)/Case Summary(ies)

April 2017 Multiple Cases: 16E-3012965, 16E-3012506, 16E-3012509 (Estate/Advance Planning) CCLS was contacted by a Vietnam War veteran and his wife in regards to their estate and advanced planning. They had been putting it off because of the fear and uncertainty of dealing with the topic, but were encouraged by family to call CCLS for assistance. After an initial consultation and phone conversation, they agreed to come in to complete and execute a will, advanced health care directive and a durable financial power of attorney. It turned out that Clients had substantial assets, including real property, vehicles, trailers, furniture and a large collection of firearms that they wished to leave to various family members. After extensive consultation and planning with the Staff Attorney, Clients decided to leave the property to different family members, including several valuable and rare firearms for their daughter, a police officer, and one to their grandson, in care of his mother until he was of suitable age to hunt and to use the firearm. Clients also were able to name agents for the power of attorney in case anything happened to them and were also able to spell out their last wishes and medical treatment plan with the health care directive. Clients were very incredibly grateful for the assistance with the estate and advanced planning before anything happened to them. May 2017 Case Number: 17E-1012153 CCLS was contacted by a 91 year old WWII veteran who suffered from elder abuse by his live in caretaker and the caretaker's girlfriend. Both the caretaker and girlfriend were financially abusing the client, and the girlfriend was also verbally abusive to the client. Client sought assistance after he realized that has stolen his bank account information and credit cards, and attempted to open new financial accounts under his name. He had the accounts closed and reported the issue to local police, who arrested the caretaker and the caretaker's girlfriend. However, both caretaker and his girlfriend, upon their release from jail went right back to Client's house and refuses his request that they leave. With assistance from a CLS staff attorney, client sought and was granted temporary elder abuse restraining orders against both the former caretaker and his girlfriend. The caretaker was found and served with court papers but failed to respond to the order or appear in court to contest it. After a court appearance, client was granted a 3-year restraining order against the caretaker, barring any contact, accessing or using any of the client's financial information, and from coming within 100 yards of client and his home. Caretaker moved out and has not made further contact with client. Client's family has since stepped in to help care for client on a rotating basis. However, caretaker's girlfriend was never found for service of court papers. So the temporary restraining order expired. However, she also has not contacted client since moving out with caretaker. Client has been instructed on how to enforce the restraining order against caretaker and how to pursue a one against caretaker's girlfriend in the future. Client has been much more at ease since the restraining order and the move out. June 2017 - Two elderly clients, who do not speak English, trusted their daughter and signed a series of documents as she requested. Unfortunately they did not know that they were signing documents that made their daughter a Power of Attorney over their affairs, as well as made her their agent under their Advance Healthcare Directive and the executor of their will. This was the antithesis of what they wanted. Once clients realized what had happened they came to us for assistance where using an interpreter, we were able to revoke the agreements and institute a new Power of Attorney, Will, and Advance Healthcare Directive for them that was consistent with their wishes.

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Optional Information on
Collaboration with Other
Advocacy Groups

April 2017 Attended MCAAA Advisory Council Meeting 4/24/17. Older American's Day on 5/17/17. June 2017 On 6/28/17, participated on a panel for about 100 seniors to talk about Elder Financial Abuse and Fraud Prevention and to discuss the wide array of resources available to Merced Seniors.	May 2017 Attended MCAAA
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PSA: 32

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Provider: Legal Services for Seniors

Counties: Monterey

Optional Success
Story(ies)/Case Summary(ies)

Client Stories. To protect the privacy of our clients, story details are changed. Legal Services for Seniors (LSS) adheres to strict attorney-client confidentiality, ensuring the privacy of all seniors seeking our services is protected.

Elder Abuse- A 73-year old widow's home was invaded by her adult son, a convicted drug dealer. The son began dealing drugs from our client's home. She was repeatedly threatened by her son and his buyers. In addition to fearing her son, our client was terrified of losing her home because of drug forfeiture laws. A LSS attorney obtained a Restraining Order to protect our client, keeping our client safe.

Probate Guardianships - A client came to LSS, heart-broken and frantic on a Monday morning after her two great-granddaughters had been physically taken from her that weekend by the maternal grandmother. The children, 9 and 6 years old, had lived in our client's home their entire lives. The children's parents had died a few years ago; our client had taken care of them since their parents' death.

That past Friday, our client was shocked when she opened her door to find the maternal grandmother standing there with a court order giving maternal grandmother full custody of our client's great-grandchildren. The order was legal, and our client had to stand by while watching the maternal grandmother take the children away from the only home they had ever known.

A Legal Services for Seniors advocate learned from court research that the grandmother, interested only in the financial resources she could receive from the County, had filed a guardianship petition with the court replete with misleading information. Virtually everything the grandmother had put in her court petition was false – that the grandmother had taken care of the children; she was only one on the school's records...

The truth is that our client was the only parental figure in the two girls' lives. LSS filed an opposition to the grandmother's guardianship, attended a court hearing and was granted custody of both children by the judge. The judge was extremely angry with the grandmother who had given so many false statements to the court and as equally pleased Legal Services for Seniors had taken on the task of returning two small children to their loving home they had known all their lives.

Landlord Tenant Dispute- A monolingual Spanish client seeks help from LSS when she receives a notice stating she must leave the apartment she has lived in for 14 years. Our Salinas Office's bilingual attorney explains the legal proceedings and negotiates with the landlord for additional time; while our client is assisted by LSS partner agencies to find new housing.

Hospice Care Story- A client came to LSS after her husband of 54-years began receiving Hospice care. The couple had never had a conversation about "end-of-life" legal issues and did not have Wills or AHCDs. After meeting separately with each client, addressing their concerns and advising them on their legal options, a LSS attorney provided them with Wills and AHCDs. All at no-cost to our clients.

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Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors continues to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center, the Santa Cruz Senior Citizens Law Center, other agencies and organizations.
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PSA: 33

Provider: Greater Bakersfield Legal Assistance, Inc. Counties: Kern

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups